

# UNIT 47 DEBRIEFING

*September 2002*

*(FAC 2001-09)*

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<b>Duty</b>	Debrief offerors at their request.
<b>Conditions</b>	Given acquisition planning, the solicitation (if any), proposal(s) or quotation(s), price negotiation memoranda, and source selection documentation.
<b>Overall Standard</b>	<p>Conduct preaward debriefings to provide feedback as soon as practicable to unsuccessful offerors.</p> <p>Disclose no offeror sensitive (e.g., proprietary data) or source selection sensitive information. Present the basis for not awarding to unsuccessful offerors, in terms of evaluation factors from the solicitation. Disclose other information required by the FAR. Provide any other information that will help the offeror(s) submit better proposals in the future, through frank and open dialogue. Tactfully answer all questions from vendor representatives. Successful offerors may be given a postaward debriefing, at their request.</p>

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## Policies

<i>FAR</i>	<i>Agency Suppl.</i>	<i>Subject</i>
13.106-2(c)(3)		Vendor request for information under the simplified acquisition threshold.
15.505		Preaward debriefing of unsuccessful offerors.
15.506		Postaward debriefing of offerors.
24.202		Prohibitions.
35.008(d)		Research and development acquisition debriefings.

## Other KSA's

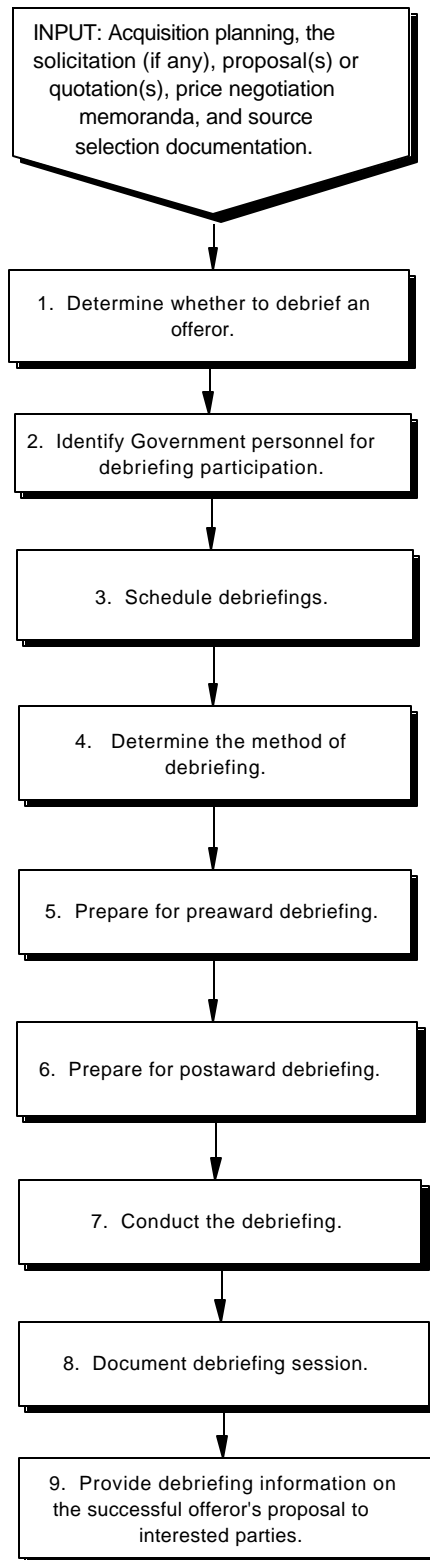
1. Skill at conducting and controlling meetings, including dealings with varying degrees of negative attitudes on the part of offerors.
2. Ability to communicate orally and in writing.
3. Ability to demonstrate understanding, tact, and empathy for unsuccessful offerors.
4. Ability to maintain the attention to detail necessary to communicate on issues.
5. Ability to calmly and effectively deal with high stress situations.
6. Ability to maintain the honesty and integrity of the acquisition process.

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**Other Policies and References (Annotate As Necessary):**

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Tasks	Related Standards
1. Determine whether to debrief an offeror.	<p>Only debrief an offeror if the firm submits a written request.</p> <ul style="list-style-type: none"><li>• An offeror must be debriefed if the firm submits a written request for debriefing within three days of receiving notice that the firm was excluded from the competitive range or received notice of contract award.</li><li>• Consider an untimely request for a debriefing when time and resources permit and the best interest of the Government will be served (e.g., debriefing should lead to improvements in the general quality of proposals).</li></ul>
2. Identify Government personnel for debriefing participation.	<p>Generally, the Contracting Officer is the Government participant in a debriefing for an acquisition with a price not exceeding the simplified acquisition threshold.</p> <p>Generally, the Contracting Officer acts as Chairperson and leads the Government team in a debriefing for an acquisition with a price exceeding the simplified acquisition threshold. Individuals who conducted the evaluations should provide support.</p>

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Tasks	Related Standards
3. Schedule debriefings.	<p>Preaward request. Make every effort to debrief the unsuccessful offeror as soon as practicable.</p> <ul style="list-style-type: none"><li>• The Contracting Officer may refuse to provide a preaward debriefing if, for compelling reasons, it is not in the best interests of the Government to conduct a debriefing at that time.<ul style="list-style-type: none"><li>- The rationale for delaying the debriefing must be documented in the contract file.</li><li>- The debriefing must be provided no later than the time postaward debriefings are provided.</li></ul></li><li>• The debriefing may be delayed at the offeror's request until after award.</li><li>• If the debriefing is delayed until after award, it must include all information normally provided in a postaward debriefing.</li></ul> <p>Postaward request. To the maximum extent practicable, the postaward debriefing should occur within five days after receipt of the written request. Offerors that requested a postaward debriefing in lieu of a preaward debriefing, or whose debriefing was delayed for compelling reasons beyond contract award, also should also be debriefed within this time period.</p>
4. Determine the method of debriefing.	<p>Debriefings may be done orally, in writing, or by any other method. Tailor the method of debriefing to the acquisition situation. Consider such methods as:</p> <ul style="list-style-type: none"><li>• Telephone conference;</li><li>• Letter;</li><li>• E-mail;</li><li>• Videoconference; or</li><li>• Conference at the Government facility.</li></ul> <p>The method selected should depend on the complexity of the acquisition situation and the apparent need for discussion.</p>

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## Tasks

## Related Standards

<p>5. Prepare for preaward debriefing.</p>	<p>Because there is no requirement for a competitive range determination in simplified acquisition, there is normally no requirement for a preaward debriefing.</p> <p>A preaward debriefing for an acquisition exceeding the SAT must:</p> <ul style="list-style-type: none"><li>• At a minimum, include:<ul style="list-style-type: none"><li>- The agency's evaluation of significant elements in the offeror's proposal;</li><li>- A summary of the rationale for eliminating the offeror from the competition; and</li><li>- Reasonable responses to relevant questions about whether source selection procedures contained in the solicitation, applicable regulations, and other applicable authorities were followed in the process of eliminating the offeror from the competition.</li></ul></li><li>• Must not disclose:<ul style="list-style-type: none"><li>- The number of offerors;</li><li>- The identity of other offerors;</li><li>- The content of other offerors' proposals;</li><li>- The ranking of other offerors;</li><li>- The evaluation of other offerors; or</li><li>- Any of the information prohibited in FAR 15.506(e).</li></ul></li></ul>
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Tasks	Related Standards
6. Prepare for postaward debriefing.	<p>For an acquisition with a price not exceeding the simplified acquisition threshold (SAT), only provide a brief explanation of the basis for the contract award decision.</p> <p>A postaward debriefing for an acquisition exceeding the SAT must:</p> <ul style="list-style-type: none"><li>• At a minimum, include:<ul style="list-style-type: none"><li>- The Government's evaluation of the significant weaknesses or deficiencies in the offeror's proposal, if applicable;</li><li>- The overall evaluated cost or price (including unit prices) and technical rating, if applicable, of the successful offeror and the debriefed offeror, and past performance information on the debriefed offeror;</li><li>- The overall ranking of all offerors, when any ranking was developed by the agency during the source selection;</li><li>- A summary of the rationale for award;</li><li>- For acquisitions of commercial items, the make and model of the item to be delivered by the successful offeror; and</li><li>- Reasonable responses to relevant questions about source selection procedures.</li></ul></li><li>• Must not include:<ul style="list-style-type: none"><li>- Point-by-point comparisons of the debriefed offeror's proposal with those of other offerors.</li><li>- Any information prohibited from disclosure by FAR 24.202 or exempt from release under the Freedom of Information Act (5 U.S.C. 552) including:<ul style="list-style-type: none"><li>? Trade secrets;</li><li>? Privileged or confidential manufacturing processes and techniques;</li><li>? Commercial and financial information that is privileged or confidential; and</li><li>? The names of individuals providing reference information about an offeror's past performance.</li></ul></li></ul></li></ul>

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Tasks	Related Standards
7. Conduct the debriefing.	Whether conducting a preaward or postaward debriefing: <ul style="list-style-type: none"><li>• Assure that the debriefing includes all required information;</li><li>• Assure that none of the information excluded from debriefing is presented.</li><li>• Keep the Q&amp;A session relatively unstructured, so that it supports a frank and open exchange of information.</li><li>• Do not talk about how agency rules and source selection procedures applied to the instant source selection.</li></ul>
8. Document debriefing session.	Include an official summary of the debriefing in the contract file. Copies of any visual aids and/or presentation script should be included as part of the summary.
9. Provide debriefing information on the successful offeror's proposal to interested parties.	If, within 1 year of contract award, a protest causes the agency to issue a new solicitation or a new request for revised proposals on the protested contract award, provide to appropriate parties any information regarding the successful offeror's proposal that was provided to any offeror in any debriefing.